SEAS REQUEST AND ELIGIBILITY FORM (CS-67)

PURPOSE:

The CS-67 is the generic entry document that is used to request services and determine eligibility in the Service Eligibility and Authorization System (SEAS) for Protecive Services Day Care services, Residential Treatment and Children's Treatment Services, in addition to purchasing services for children in a subsidized adoption and family preservation services to contracted FPS providers. The CS-67 is completed and entered at the county office (except residential treatment services) and has two parts:

> NOTE: Non client specific services such as resource coordinator should not be authorized in the SEAS system. These services should be billed on a CS-65 sent to the Children's Services Payment Unit (CPAY) for data entry.

1)   Part A - Request. This section of the form is completed when an applicant is requesting Day Care or when the family or children's service worker makes a referral for Day Care, Residential Treatment, Children's Treatment or Family Preservation services on behalf of the client or family.

2)   Part B - Eligibility. This section of the form is completed when the household's eligibility for the requested services has been determined. The determination should be within 15 working days of the request.

NUMBER OF COPIES AND DISTRIBUTION:

The CS-67 is a two copy self carboning form. The first copy (white) is the data entry operator's copy. The second copy (canary) is the case record copy. After the form has been entered into SEAS, the data entry operator should initial and indicate the date and time of entry on the form. The case record copy should be retained until the turnaround report is received the following day. The data entry operator's copy should be retained in a file for 30 days.

The worker who is responsible for authorizing the services completes the request and eligibility determination information.

If the client is determined eligible to receive services and the funding and a provider are available, the authorizing worker completes a CS-67A (SEAS Authorization Form).

A notification (turnaround) report will be printed at the County Office of the authorizing worker the day after the CS-67 has been entered in SEAS, using the SO20 print subsystem. The name of the authorizing worker will be displayed at the top of the form. The turnaround report can be used to update request or eligibility information. The authorizing worker is the only worker to update household information. Turnaround notices for information only will also be produced and mailed the day after entry to the case manager and service worker.

> NOTE: All turnarounds for residential treatment including emergency services will be sent to the Area office.

INSTRUCTIONS FOR COMPLETION:

An asterisk (*) next to an item indicates the code is listed on the CS-67 Code Sheet.

PART A, REQUEST INFORMATION:

*1. Request Action Codes: Action codes to report request information are identified below. Enter the appropriate two (2) letter code in this field. This is a mandatory field.

IR - Initial Request. Use this code to enter request information for a household that was not previously entered in the system.

UR - Update Request. Use this code when updating request information. Any field except request date (Field 2) can be updated with this action code.

NOTE: However, on the day of entry, all fields (including field 2) can be updated using this action code.

RR - Redetermine Request. Use this code for redetermining a request for continued eligibility when an eligibility period is due to expire within 60 days. This code should also be used to indicate a new request date for a household that was previously closed or when the eligibility period has lapsed and the household is again requesting services. The request date should not be updated when a program area is added to a household already eligible.

NOTE: After request information is entered, this date remains in the SEAS system for the household.

- 2 -

This information can be updated using the "UR - Update Request" code, with the exception of the request date, which should be updated only to redetermine a household or to indicate a new request for a household that was closed or eligibility has lapsed.

XF - Case Transfer. Use this code to transfer a case when a family has moved to another county. To transfer a case, enter the head of household DCN, the new address, if known, and the FIPS county code for the new county of residence.

NOTE: All active authorizations should be closed prior to using this action code. If an authorization is not closed, the sending county continues to be responsible for payment. It is permissible, to facilitate uninterrupted service to the client, for the sending county to continue to provide service after the sending date. This is done by entering a close date which is later than the date of transfer. This process allows the receiving county time to review the eligibility and reauthorize.

2.   Request Date: Enter the date (MM/DD/YY) the applicant requested services or the date the service worker requested services on behalf of the client. This will be the date services were determined necessary as part of the case plan for PS or AC clients or Adoption Subsidy agreement for AS households.

If at all possible, entry of the request date and other request information should be entered into SEAS the date of request or the next day, in order to "register" the request in the system. For adoption subsidy clients, the request date should be the date the adoption subsidy agreement has been signed by the Director of the Division of Family Services or later if applicable. Any service requested through SEAS must be a contracted service stipulated in the adoption subsidy agreement. This is a required field.

3.   Authorizing Worker and Office: The five (5) digit ID number and the three (3) digit county FIPS code of the worker who completes the request for services must be For an adoption subsidy household (Eligibility Type AS), the adoption specialist will be the authorizing worker for all contracted services entered in SEAS.

This worker also determines the household's eli-gibility and authorizes services for eligible individuals in the household. This worker's ID number

- 3 -

and office number must also be entered on the eligibility screen and the office number entered in the request screen must match the office number entered in the eligibility screens. This is a mandatory field.

Case Transfer Information: When a family, for whom request and/or eligibility information has been entered, moves to a different county, the sending county must verify the new residence and update the CS-67 to show the new county code (using an action code of "XF"), and new address and telephone number, if known. Based upon the new county code entered, the system will automatically enter the worker ID number of the county director in the transfer county.

A turnaround report will be printed at the transfer county the day after entry. Immediately, upon receipt of the CS-67 turnaround report in the transfer county, the case should be assigned. An update must be made to report the assigned worker's ID number. If the previous county did not update the address and telephone number, it should be entered at this time. The new worker will need to determine if services continue to be needed. A new eligibility determination may be necessary if the move caused extensive changes in the family's situation. At a minimum, a review of eligibility is necessary.

4.   Service Worker and Office: The five (5) digit ID number and the three (3) digit FIPS county code of the service worker is entered in this field. The service worker would be different from the authorizing worker. A service worker may be assigned if the family has court involvement and the family moves from the county of court jurisdiction. The FIPS county code must be entered if a worker ID number is entered.

5.   Case Manager and Office: The case manager five digit ID number and three digit FIPS county code will be entered in this field. The FIPS county code must be entered if a worker ID number is entered. Office codes for fields 3, 4 and 5 are located on the CS-67A Code Sheet.

6.   Head of HHLD DCN: The eight digit Departmental Client Number (DCN) of the head of the household is entered in this field. This DCN is entered on the head of household REQ/ELIG Menu Screen in the household field and displayed on the request screen. This is a required entry on the menu screen.

7. Head of Household Name: The last name, first name and middle initial of the head of household is entered in this field and displayed on the request screen based on the DCN entered on the menu screen. An entry must be made in this field.

    NOTE: For fields 6 and 7, use the DCN and head of household name. For a protective service family for whom services are being requested, use the case name and DCN from the SS-63. For an alternative care client for whom services are being requested, use the child's name and DCN from the SS-61, as an alternative care child is considered a one person household. For an adoption subsidy family, for whom services are being requested, use the name of one of the parents as shown on the SS-60 form. A DCN for one of the adoption subsidy parents will need to be assigned if not already assigned, as the adoptive parent is considered as the head of household.

8. Address: Line 1: Enter the first line of the street address of the head of household in this field. This is a required field.

    Line 2: Enter the second line of the street address of the head of household, if applicable. If there is a post office box in addition to the street address, it should be entered here. Address information must be entered in Address Line 1 before an entry will be allowed in Address Line 2. However, care should be taken to ensure an accurate and current address since notification letters are mailed to this address.

    NOTE: In order to delete information entered in Address Line 2, enter an asterisk (*) in the first position in this field.

9. City: Enter the city in which the head of household resides. This is a required field.

10. State: Enter the two letter code for the state in which the head of household resides. This is a required field.

11. Zip Code: Enter the zip code for the city and state in which the head of household resides. This field accepts nine digits, but requires five digits.

    NOTE: For an AC child, enter the child's current address in fields 8 - 11. If a child is being placed at an emergency residential facility and

- 5 -

the address of the facility is known, enter the facility's address. If placement is temporary, it is permissible to enter the county office address.

12. <u>Telephone</u>: Enter the work and home telephone number, including the area code, for the head of household. This is an optional field.

13. <u>No. of Persons:</u>: Enter the number of services requested in the household for each program area (Day Care, CTS, Residential Treatment). If services are to be provided for the entire family (i.e., family therapy, homemaker), the number of services entered would be "01" even though more than one person in the family will receive the services. This is because these services are regarded as one service for the whole family. The types of services are identified according to program area for Day Care (DC), Children's Treatment and Residential Treatment services. An entry must be made for each program. If no services for a particular program area are being requested, "00" must be entered. An entry of more than "0" must be entered in one of the program areas. This is a two position field.

   NOTE: The program area "Other" (OT) is not used at this time.

<u>PART B, ELIGIBILITY DETERMINATION</u>

*14. <u>Eligibility Action Codes</u>: Action codes to report eligibility information are identified below. Enter the appropriate two (2) letter code in this field. Eligibility action codes are also displayed on the head of household request/ eligibility menu screen.

   NOTE: The last action and action date will be displayed on the eligibility screens to indicate the type of action and date of last action.

   ID - Initial Eligibility Determination. Use this code when an initial eligibility determination is being completed to indicate the household's approval or rejection for services.

   RD - Redetermine Eligibility. Use this code when the household's current eligibility is due to expire and the household has been determined eligible for continued services. A redetermination of eligibility cannot be completed more than sixty (60) days prior to the end of the current eligibility period. The

authorizing office code must match the authorizing office entered in the request.

UD - Update Eligibility Determination. Use this code when updating eligibility information as a result of changes. The only fields which can be updated are worker ID and office, waiting list information, updating eligibility information as a result of changes. The only fields which can be updated are worker ID and Office, waiting list information, determination reason and family size.

CL - Close Eligibility Determination. Use this action code when closing the case. Closing information is entered in the review fields (Review Date, Outcome and Outcome Date) on the CS-67 turnaround report. The review outcome codes for closing are listed on the CS-67 Code Sheet.

For AS eligibility types, the outcome date (date the closing will occur) must be at least 11 days from the date of entry to allow for timely notification of the closing to the head of household. For these eligibility types, the household will receive a ten (10) day system generated notification of the proposed adverse action and a final closing letter after the 11 days have elapsed.

For PS and AC eligibility types, the outcome date for closing should be the date the household no longer is in need of services and can be a date in the future if it is known in advance that the household should be closed. This action code also closes all active authorizations attached to the household and removes the household from the waiting list.

CC - Cancel Close Eligibility. Use this action code to cancel a closing that was entered in error or if the proposed closing is no longer valid. This action code can be used for all eligibility types. However, the cancel closing must be on or before the date indicated as the outcome date for the proposed closing (e.g., a case with an outcome date of 11/05/92 can be cancel closed on or before 11/05/92).

A cancel closing also re-opens any authorizations that were to be closed with the CL action code.

RW - Remove Case from Waiting List. Use this action code to remove a household from the waiting list. A household will automatically be removed from the waiting list when the case is closed using the Close Eligibility Action Code (CL). Households with

eligibility periods that have expired without a redetermination will remain on the waiting list until removed by the authorizing worker using this action.

*15. Determination: This is a two part field.

Reason: Enter a two letter approval or rejection code which identifies why the household was approved or rejected for the requested services. PS and AS eligibility types should not be rejected as the household is eligible as part of the case plan for PS types or as part of the adoption subsidy agreement for AS types.

NOTE: A household should not be rejected if the only reason for ineligibility is due to a lack of funding for the service. If otherwise determined eligible, the household should be approved and placed on the waiting list.

Date: An eligibility determination date must be entered in this field. The eligibility determination date must be entered in the system immediately upon completion of a CS-67 and cannot be prior to the Request Date. For PS, AC and AS eligibility types, the eligibility determination date can be the same day as the Request date, as need is determined by the case plan or the adoption subsidy agreement.

*16. Waiting List Information:

Number of Persons: Enter the number of individuals waiting for a service in a program area (Day Care, CTS, RT) that is currently unavailable. An individual should be placed on a waiting list when funds are not available for the service or when a provider is not available. The number of persons in a household waiting for a service cannot be more than 20. Any authorizations for services to the household completed after waiting list information has been entered will decrease the number of persons waiting by the number of authorizations completed. This field should only be completed when it is necessary to place a client on the waiting list.

Priority Code: A two digit priority code must be entered if an entry is made in the waiting list entry field. A priority code establishes a household's ranking on the waiting list by program area.

The waiting list screen will list households by county office, program area and eligibility type. Within eligibility type the waiting list screen will rank

- 8 -

households by waiting list priority code and by
determination date. All waiting list information
entered for a household will remain in SEAS until
removed by the authorizing worker using the action
code of RW (Remove Case from Waiting List) or action
is taken to close the household's case. If the
household's eligibility laspes, SEAS does not
automatically remove the family from the waiting list.

*17.   Eligibility Type: Enter a two letter code in this
       field to identify a household's eligibility type.

       If a household changes eligibility types, for example
       from AS to AC, the AS eligibility type would be closed
       and a CS-67 opened showing a determination for the AC
       eligibility type.

       Specific request information: This is a free format
       field to be used by the authorizing worker to
       communicate the specific type(s) of services requested
       for the household. This information will be reviewed
       by the authorizing designee to evaluate whether or not
       adequate funding is available to provide the ser-
       vice(s).

       After completing the request and eligibility
       determination approving the household, the authorizing
       worker will need to communicate with the authorizing
       designee regarding the availability of funds for any
       services that will be authorized on the CS-67A. The
       authorizing designee will review information entered
       in the specific service request information and make a
       determination as to the availability of funds for the
       service. If funds are not available, the authorizing
       designee will advise the authorizing worker to enter
       waiting list information for the household on the CS-
       67 for all or some of the services.

 18.   Eligibility Dates: Enter the eligibility begin and
       end dates. These dates are required. The eligibility
       period must be a minimum of 30 days but no more than
       one year (e.g., 07-01-92 to 07-31-92, 07-01-92 to 06-
       30-93).

       The eligibility begin date must be the same as the
       eligibi- lity determination date for an initial
       eligibility determination. For a redetermination, it
       can be the same date or later (up to 60 days) than the
       eligibility determination date. If a determination
       for more than one program area has been completed, all
       eligibility dates must be the same. When adding a
       service to a program after the eligibility
       determination has been completed, the number of

persons requesting the service, the determination date and reason and waiting list information, if appropriate, must be entered. This is a six position field.

19. Family Income: Leave this field blank.

20. Family Size: Leave this field blank.

Worker Signature and Date: The authorizing worker identified in Field 3 must sign and date the form.

INSTRUCTIONS FOR RETENTION:

A 30-day revolving file should be maintained in the county office for all data entered forms (original). After 30 days, the CS-67 form can be destroyed.

The copy should be maintained in the client case file until the turnaround form is received. The turnaround report will be retained in the client case file until the next turnaround report is received.

MEMORANDA HISTORY: CS87-58, CS87-105, CS92-43